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Flame Retardants Market by Type (Aluminum Trihydrate, Antimony Oxide, Brominated), Application (Epoxy, Polyolefin, Unsaturated Polyester), End-Use Industry (Building & Construction, Electronics & Appliances), and Region - Global Forecast to 2028

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Abstracts

In terms of value, the flame retardants market is estimated to grow from USD 7.0 billion in 2022 to USD 9.5 billion by 2028, at a CAGR of 5.2%. Government regulations and safety standards often require the use of flame retardants in various products to minimize fire risks. As fire safety regulations become stricter or are more rigorously enforced, the demand for flame retardants can increase. High-profile fire disasters may increase public awareness of the need for fire safety, increasing the market for consumer products made of flame retardant materials. All these factors drive the market for flame retardants across the globe.

“Phosphorus was the second largest type of the flame retardants, in terms of value, during the forecast period.”

The demand for phosphorus flame retardants has been increasing in recent years, primarily due to growing concerns about the environmental and health impacts of traditional brominated flame retardants and halogenated compounds. Phosphorus-based flame retardants offer several advantages that make them increasingly popular. Phosphorus flame retardants are generally considered to be less harmful to the environment and human health compared to some traditional halogenated flame retardants, which may release toxic byproducts when they burn.

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“Cosmetics is expected to be the second fastest-growing end-use industry of the flame retardants market, in terms of value, during the forecast period.”

As consumers become more environmentally conscious, there is a preference for natural and sustainable skincare ingredients. Flame retardants reinforces the skin's natural barrier, helping to keep it healthy and resilient. Additionally, it can help with moisture barrier repair for the skin, especially when used in skincare products for dry or injured skin. The demand for flame retardants in cosmetics and skincare is driven by its natural and beneficial properties, its compatibility with various skin types, and consumer preferences for sustainable and effective ingredients.

“Asia Pacific is projected to be the fastest growing region, in terms of value, during the forecast period in the flame retardants market.”

Asia Pacific is known for its low cost of labor, easy availability of raw materials, increase in adoption of modern technologies, innovations, and easy availability of inexpensive lands, which makes it the global hub for manufacturing. The increasing population in countries like India and China, drives the demand for cosmetics, food and pharmaceutical products. Asia Pacific’s pharmaceutical industry is growing and actively involved in research and development. Flame retardants is used in pharmaceutical applications, including as an adjuvant in vaccines, which may contribute to its demand. Also factors such as rising middle class population, demand for vegan and cruelty-free products and health and wellness trends fuels the demand for flame retardants in this region.

By Company Type: Tier 1 - 69%, Tier 2 - 23%, and Tier 3 - 8%

By Designation: C-Level - 23%, Director Level - 37%, and Others - 40%

By Region: North America - 32%, Europe - 21%, Asia Pacific - 28%, Middle East

& Africa - 12%, South America – 7%

The key players profiled in the report include Amyris, Inc (US), SOPHIM (France), Merck KGaA (Germany), Kishimoto Special Liver Oil Co., Ltd. (Japan), Empresa Figueirense De Pesca (Portugal), Arbee (India), Cibus (US), Otto Chemie Pvt. Ltd. (India), Arista Industries (US), and Oleicfat s.l. (Spain).

Research Coverage

This report segments the market for flame retardants based on source, end-use industry, and region and provides estimations of volume (ton) and value (USD thousand) for the overall market size across various regions. A detailed analysis of key industry players has been conducted to provide insights into their business overviews, services, key strategies, associated with the market for flame retardants.

Reasons to Buy this Report

This research report is focused on various levels of analysis — industry analysis (industry trends), market share analysis of top players, and company profiles, which together provide an overall view on the competitive landscape; emerging and high-growth segments of the flame retardants market; high-growth regions; and market drivers, restraints, and opportunities.

The report provides insights on the following pointers:

Market Penetration: Comprehensive information on flame retardants offered by top players in the global market

Analysis of key drives: (Increasing demand for cosmetic products, beneficial for human health, rising popularity in nutraceuticals, and growth in R&D activities in pharmaceutical industry), restraints (Consumer skepticism about animal-sourced products and limitations

on shark fishing), opportunities (new renewable sources for production), and challenges (fluctuating costs of raw materials) influencing the growth of flame retardants market.

Product Development/Innovation: Detailed insights on upcoming technologies,

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research & development activities, and new product & service launches in the flame retardants market

Market Development: Comprehensive information about lucrative emerging markets — the report analyzes the markets for flame retardants across regions

Market Diversification: Exhaustive information about new products, untapped regions, and recent developments in the global flame retardants market

Competitive Assessment: In-depth assessment of market shares, strategies, products, and manufacturing capabilities of leading players in the flame retardants market

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*Details on Business overview, Products offered, Recent Developments, Product launches, Deals, Other developments, MnM view, Key strengths, Strategic choices, Weaknesses and competitive threats might not be captured in case of unlisted companies.

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About

Growing Demand from End-user Industries

Wire and cable is one of the important application markets for flame retardant. Growth of this end-user industry is critical for the growth of flame retardant chemical market.

Wire and cable market is expected to witness a significant demand growth in the near future driven by rapid expansion in the wind energy, nuclear energy, and other green energy sectors.

Growing demand for wire & cable will stem from rapid expansion of information processing and communications sector. This is expected to trigger the demand for flame retardants.

Telecommunications, data wire & cable category occupied the largest chunk of the global insulated wire and cable market. Further, ever increasing adoption of the internet also triggered the market for telecommunications, data wire & cable across the world.

Power and wire & cable represented another growth market in the global insulated wire & cable market.

All these advancements in wire & cable industries are expected to result in growing demand for flame retardants.

Raw Material Analysis

Bromine production is growing steadily across the world and its price is estimated to double within short time span from 2014 to 2019.

This price rise is a result of growing demand throughout the world, especially in China. Since 2013, prices have risen from $XX per ton in 2013 to over $XX per ton in 2014.

Currently, bromine prices continued to rise and are expected to grow further in the coming years due to its use in wide range of applications.

These fluctuations in raw material prices, have greatly affected the downstream business including flame retardant chemicals industry. It is expected that bromine prices

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will reach $XX per metric ton by 2019, at a CAGR of XX% from 2014 to 2019.

Price Analysis

Flame retardant chemicals are not standardized products; these are in various types and used in numerous applications. Prices vary with the type of flame retardant chemicals, and its applications.

It is thus difficult to generalize flame retardant chemicals and estimate its prices; the following table compares the average prices of major types of flame retardant chemicals including aluminum trihydrate, antimony oxides, brominated compounds, chlorinated compounds, and organophosphorus compounds.

Prices of flame retardant chemicals are driven by the raw materials prices. Supply constraints play major role in deriving flame retardant chemicals prices. For instance, phosphorus is an important input used in manufacturing of organophosphate compounds.

However, XX% of phosphorus produced globally is consumed by agrochemicals industry. Moreover, phosphorus manufacturing activities are concentrated in few major countries including China, the U.S., Morocco, Russia, and Tunisia. Due to this, manufacturers face difficulties in procurement of raw materials which in-turn reflect in the pricing of the flame retardant chemicals.

This graph summarizes prices of major flame retardant chemicals. Price of different flame retardant chemicals varies with grade and quality; and thus it is difficult to estimate an average price of flame retardant chemicals.

Because of its special properties antimony oxides, brominated and organophosphorus compounds are costlier as compared to aluminum trihydrate.

Prices of the flame retardant chemicals are expected to increase marginally from 2014 to 2019.

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